LINDNER CAPITAL ADVISORS

PORTFOLIO CHANGE AUTHORIZATION

accountservicing@lindnercapital.com Fax: (770) 977-7113

1) General Information

Client Name		Rep Name
Last 4 of SSN	Account Type	Last 4 of Account Number

2) From (Current Model) :

Traditional Portfolio Series

- ☐ Retirement 20/80 Very Conservative
- ☐ Retirement 35/65 Conservative Growth
- ☐ Retirement 50/50 Balanced
- ☐ Retirement 65/35 Moderate Growth
- ☐ Retirement 80/20 Growth
- ☐ Retirement 95/5 Aggressive Growth
- ☐ Taxable 20/80 Very Conservative
- ☐ Taxable 35/65 Conservative Growth
- ☐ Taxable 50/50 Balanced
- ☐ Taxable 65/35 Moderate Growth
- ☐ Taxable 80/20 Growth
- ☐ Taxable 95/5 Aggressive Growth

Defensive Portfolio Series

- ☐ Retirement Defensive Capital
- ☐ Taxable Defensive Capital
- ☐ Strategic Fixed Income

Contemporary Portfolio Series

- ☐ Retirement Strategic Alternative Portfolio
- ☐ Taxable Strategic Alternative Portfolio
- ☐ Strategic Alternative Blend

Tactical Portfolio Series

- ☐ Tactical Economic Portfolio

Global Portfolio Series (Accounts Under $100,000)

- ☐ Global 95/5
- ☐ Global 80/20
- ☐ Global 65/35
- ☐ Global 50/50
- ☐ Global 35/65
- ☐ Global 20/80

To (New Model) :

Traditional Portfolio Series

- ☐ Retirement 20/80 Very Conservative
- ☐ Retirement 35/65 Conservative Growth
- ☐ Retirement 50/50 Balanced
- ☐ Retirement 65/35 Moderate Growth
- ☐ Retirement 80/20 Growth
- ☐ Retirement 95/5 Aggressive Growth
- ☐ Taxable 20/80 Very Conservative
- ☐ Taxable 35/65 Conservative Growth
- ☐ Taxable 50/50 Balanced
- ☐ Taxable 65/35 Moderate Growth
- ☐ Taxable 80/20 Growth
- ☐ Taxable 95/5 Aggressive Growth

Defensive Portfolio Series

- ☐ Retirement Defensive Capital
- ☐ Taxable Defensive Capital
- ☐ Strategic Fixed Income

Contemporary Portfolio Series

- ☐ Retirement Strategic Alternative Portfolio
- ☐ Taxable Strategic Alternative Portfolio
- ☐ Strategic Alternative Blend

Tactical Portfolio Series

- ☐ Tactical Economic Portfolio

Global Portfolio Series (Accounts Under $100,000)

- ☐ Global 95/5
- ☐ Global 80/20
- ☐ Global 65/35
- ☐ Global 50/50
- ☐ Global 35/65
- ☐ Global 20/80

3) Special Instructions

☐ I would like to complete a new risk analysis questionnaire to assess my updated risk tolerance.

4) Signature

I have been offered a new risk assessment. Based upon my risk tolerance and investment objectives, I request and authorize a change from the Current Portfolio to the New Portfolio indicated for the account referenced above.

X

Client Signature Date